DOCUMENTACIÓN

Manual de Instalación

Captaris Workflow

Elaborado por TecnoPortales
Desarrollo de Software
2009

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AZMan: 29
Error de permisos en Captaris que provoca la falla en la tarea que se ejecuta en el proceso. 29
Causa: Esto se debe a que el usuario cargado en AZMan no es el mismo que ejecuta Captaris a travez del servicio web. 29
Solucion: Verifique el usuario en AZMan y vuelva a realizar las pruebas o cargue en AZMan todos los usuarios asi no tendrá el mismo inconveniente si otro usuario accede. 29

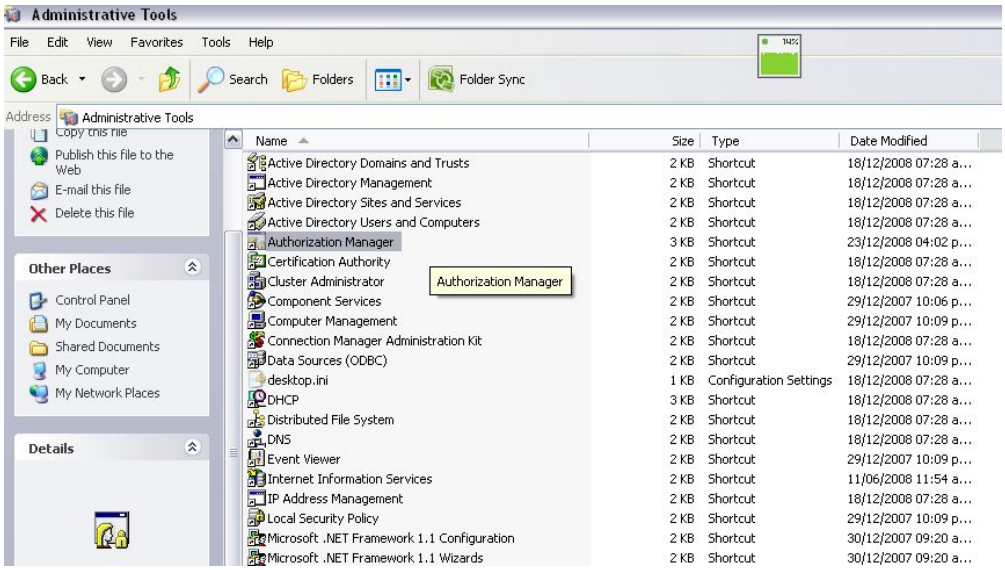
Requerimientos de Sistemas para Captaris Server/IIS Server

1. *Sistema Operativo:*
   - *Windows Server 2003 (recomendado)*
   - *Windows Server 2003 R2*
   - *Windows Server 2000*
   - *Windows Server 2000 Advanced (con actualizaciones Windows disponibles)*
2. *IIS:*
   - *6.0 (recomendado) o*
   - *5.0*
3. *Procesador: Pentium 4*
4. *RAM: 1GB*
5. *Espacio de Disco: 400 MB + 1 GB (Database)*
6. *SQL Server 2000, SP3,SQL Server 2005 or SQL 2005 Express*
7. *SQL Server 2000 Analysis Services, Reporting Services SP2 (opcional).*
8. *.NET Framework 2.0*

Instalación AzMan

AzMan es un componente de Windows Server 2003.

Controlar si lo tiene instalado (Verificar en Control Panel/Administrative Tools)


Administrative Tools
File Edit View Favorites Tools Help
Back Search Folders Folder Sync
Address Administrative Tools
Publish this file to the Web
E-mail this file
Delete this file
Other Places
Control Panel
My Documents
Shared Documents
My Computer
My Network Places
Details
Name Size Type Date Modified
Active Directory Domains and Trusts 2 KB Shortcut 18/12/2008 07:28 a...
Active Directory Management 2 KB Shortcut 18/12/2008 07:28 a...
Active Directory Sites and Services 2 KB Shortcut 18/12/2008 07:28 a...
Active Directory Users and Computers 2 KB Shortcut 18/12/2008 07:28 a...
Authorization Manager 3 KB Shortcut 23/12/2008 04:02 p...
Certification Authority 2 KB Shortcut 18/12/2008 07:28 a...
Cluster Administrator 2 KB Shortcut 18/12/2008 07:28 a...
Component Services 2 KB Shortcut 29/12/2007 10:06 p...
Computer Management 2 KB Shortcut 29/12/2007 10:09 p...
Connection Manager Administration Kit 2 KB Shortcut 18/12/2008 07:28 a...
Data Sources (ODBC) 2 KB Shortcut 29/12/2007 10:09 p...
desktop.ini 1 KB Configuration Settings 18/12/2008 07:28 a...
DHCP 3 KB Shortcut 18/12/2008 07:28 a...
Distributed File System 2 KB Shortcut 18/12/2008 07:28 a...
DNS 2 KB Shortcut 18/12/2008 07:28 a...
Event Viewer 2 KB Shortcut 29/12/2007 10:09 p...
Internet Information Services 2 KB Shortcut 11/06/2008 11:54 a...
IP Address Management 2 KB Shortcut 18/12/2008 07:28 a...
Local Security Policy 2 KB Shortcut 29/12/2007 10:09 p...
Microsoft .NET Framework 1.1 Configuration 2 KB Shortcut 30/12/2007 09:20 a...
Microsoft .NET Framework 1.1 Wizards 2 KB Shortcut 30/12/2007 09:20 a...
Authorization Manager

Si no se encuentra instalado:

1. ***Bajar Microsoft Windows Server 2003 Administration Tools Pack:***

http://www.microsoft.com/downloads/details.aspx?familyid=c16ae515-c8f4-47ef-a1e4-a8dcbacff8e3&displaylang=en

2. ***Ejecutar adminpak.exe. Este ejecutable descomprime:***
   a. ***Apver.vbs***
   b. ***ADMINPAK-README.TXT***
   c. ***Adminpak.msi***
3. ***Ejecutar adminpak.msi y seguir instrucciones de instalación.***
4. ***Verificar en Control Panel/Administrative Tools la existencia de Authorization Manager.***

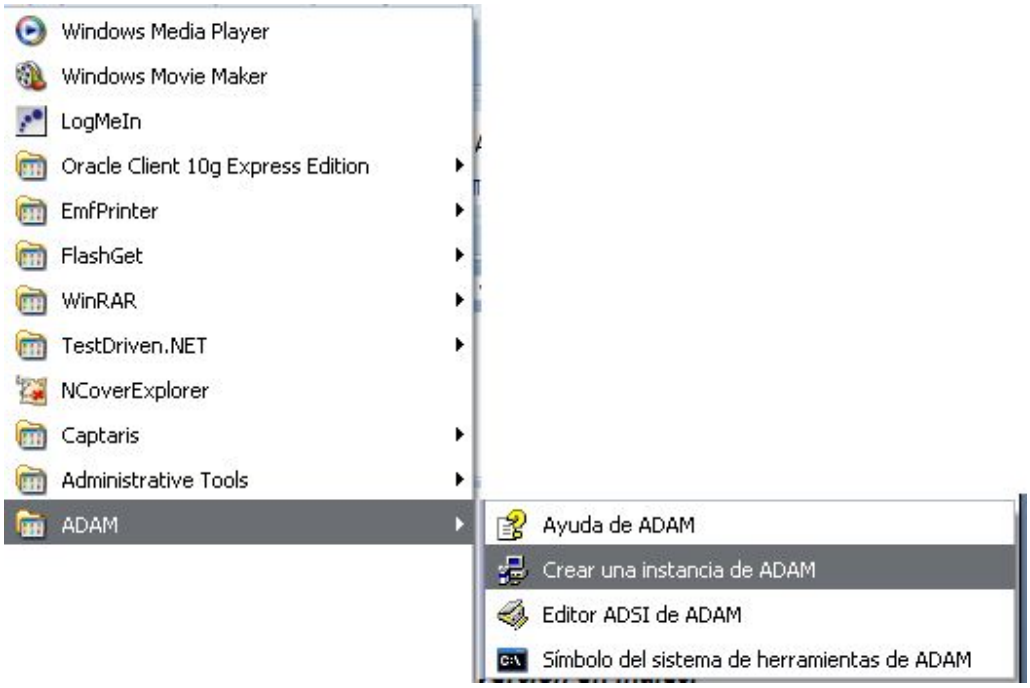
Instalación ADAM

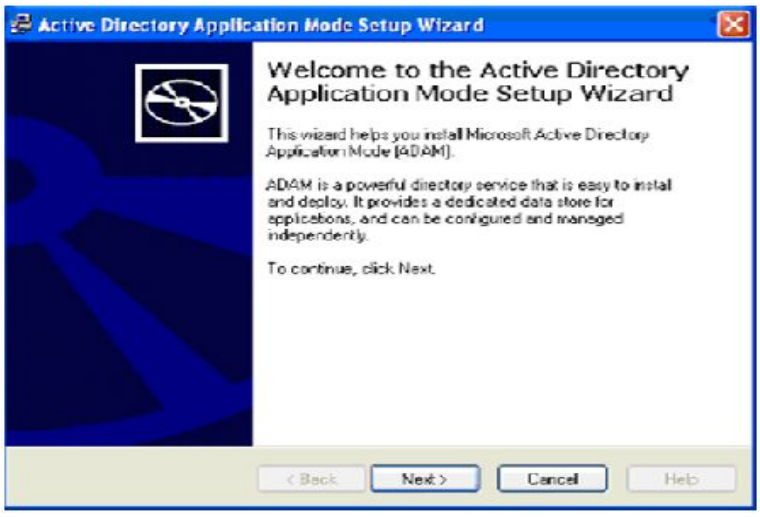
Bajar ADAM de: http://go.microsoft.com/fwlink?linkid=29359

1) ***Ejecutar ADAMSP1_x86_ES.exe (en español) o la versión en ingles.***

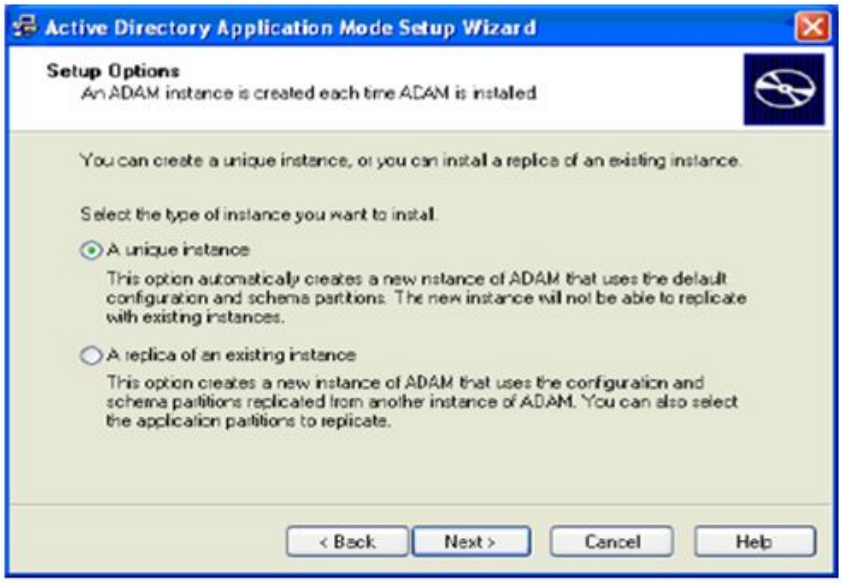
Crear una nueva instancia en ADAM

1) **Dentro del menú de ADAM seleccionar : "Crear una instancia de ADAM"**

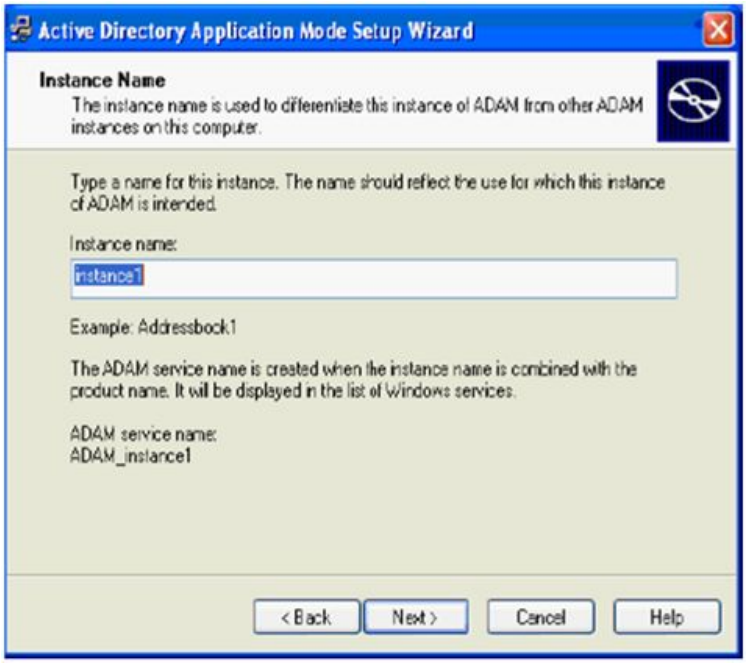



Active Directory Application Mode Setup Wizard
Welcome to the Active Directory Application Mode Setup Wizard
This wizard helps you install Microsoft Active Directory Application Mode (ADAM).
ADAM is a powerful directory service that is easy to install and deploy. It provides a dedicated data store for applications, and can be configured and managed independently.
To continue, click Next.
< Back
Next >
Cancel
Help

2) ***Click Next***
3) ***En "Setup Options" elegir la primera opción y pasar a la siguiente pantalla.***

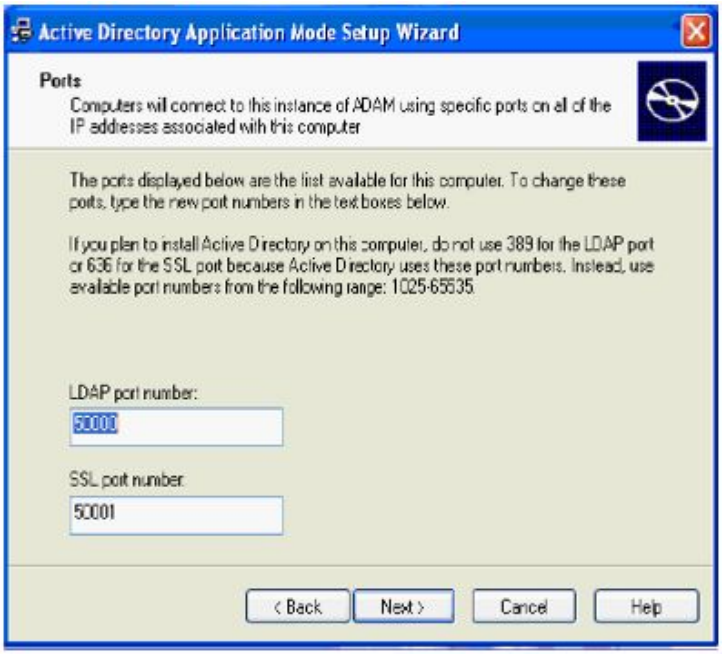

Active Directory Application Mode Setup Wizard
Setup Options
An ADAM instance is created each time ADAM is installed
You can create a unique instance, or you can install a replica of an existing instance.
Select the type of instance you want to install.
A unique instance
This option automatically creates a new instance of ADAM that uses the default configuration and schema partitions. The new instance will not be able to replicate with existing instances.
A replica of an existing instance
This option creates a new instance of ADAM that uses the configuration and schema partitions replicated from another instance of ADAM. You can also select the application partitions to replicate.
< Back
Next >
Cancel
Help

4) En "Instance Name" colocar un nombre a la instancia y pasar a la siguiente pantalla.


Active Directory Application Mode Setup Wizard
Instance Name
The instance name is used to differentiate this instance of ADAM from other ADAM instances on this computer.
Type a name for this instance. The name should reflect the use for which this instance of ADAM is intended.
Instance name:
instance1
Example: Addressbook1
The ADAM service name is created when the instance name is combined with the product name. It will be displayed in the list of Windows services.
ADAM service name:
ADAM_instance1
< Back
Next >
Cancel
Help

5) En "Ports" incorporar los siguientes valores:

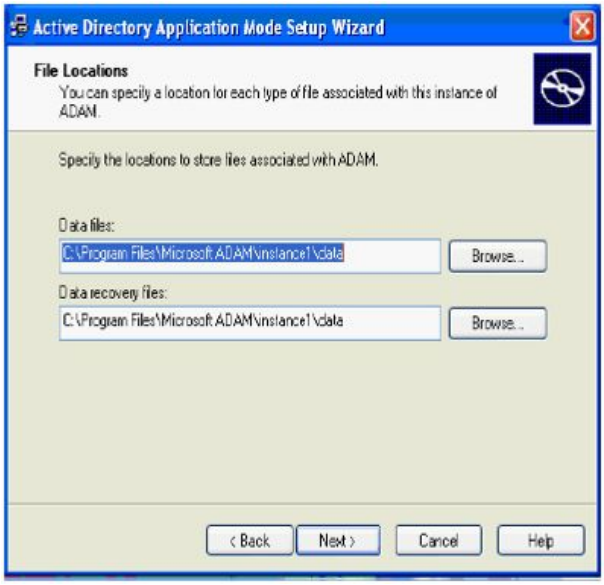
- ***a. LDAP port number: 50000***
- ***b. SSL port number: 50001***


Active Directory Application Mode Setup Wizard
Ports
Computers will connect to this instance of ADAM using specific ports on all of the IP addresses associated with this computer
The ports displayed below are the list available for this computer. To change these ports, type the new port numbers in the text boxes below.
If you plan to install Active Directory on this computer, do not use 389 for the LDAP port or 636 for the SSL port because Active Directory uses these port numbers. Instead, use available port numbers from the following range: 1025-65535.
LDAP port number:
50001
SSL port number:
50001
< Back
Next >
Cancel
Help

6) ***Pasar a la siguiente pantalla (Click Next).***
7) ***En "Application Directory Partition" seleccionar la segunda opción, ingresar el siguiente valor y pasar a la siguiente pantalla.***
   a. ***Partition name: "DC=Workflow, DC= CAPA"***

Active Directory Application Mode Setup Wizard
Application Directory Partition
An application directory partition stores application-specific data.
Do you want to create an application directory partition for this instance of ADAM?
No, do not create an application directory partition
Select this option if the application that you plan to install creates an application directory upon installation, or if you plan to create one later.
Yes, create an application directory partition
Select this option if the application that you plan to install does not create an application directory partition upon installation. A valid partition name is any distinguished name that does not already exist in this instance. Example distinguished name: CN=Partition1,DC=Woodgrove,DC=COM
Partition name:
DC=Workflow,DC=CAPA
< Back
Next >
Cancel
Help

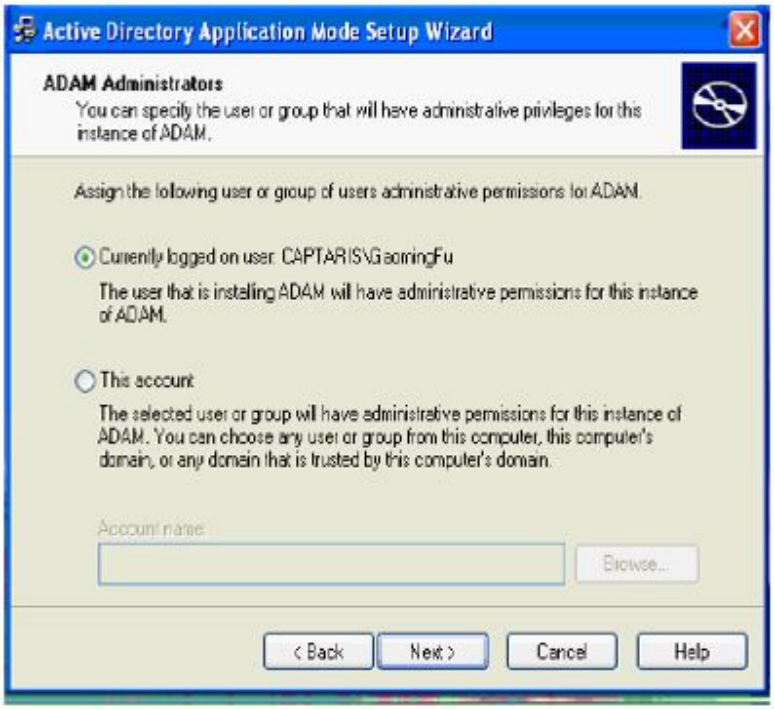
8) ***En "File Locations" puede cambiar el directorio de localización de los archivos o dejar los valores predeterminados y pasar a la siguiente pantalla.***


Active Directory Application Mode Setup Wizard
File Locations
You can specify a location for each type of file associated with this instance of ADAM.
Specify the locations to store files associated with ADAM.
Data files:
C:\Program Files\Microsoft ADAM\instance1\data
Browse...
Data recovery files:
C:\Program Files\Microsoft ADAM\instance1\data
Browse...
< Back
Next >
Cancel
Help

9) ***En "Service Account Selection" seleccionar la primer opción y pasar a la siguiente pagina.***

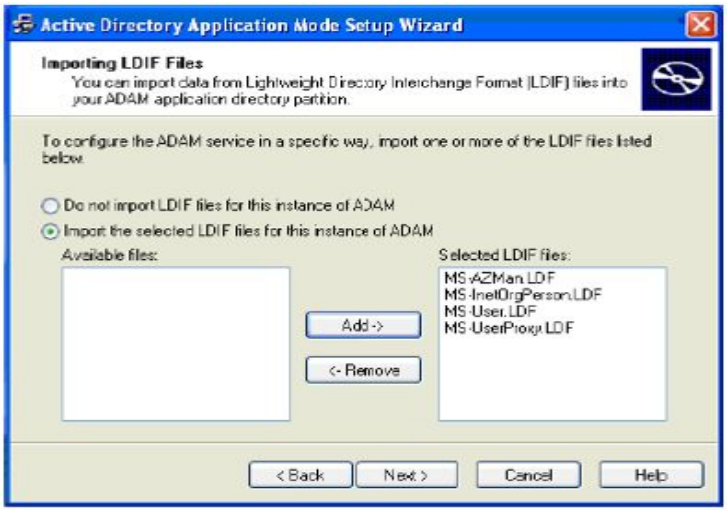
Active Directory Application Mode Setup Wizard
Service Account Selection
ADAM performs operations using the permissions associated with the account you select.
Set up ADAM to perform operations using the permissions associated with the following account.
Network service account
ADAM has the permissions of the default Windows service account.
This account
ADAM has the permissions of the selected account. Ensure that the account you select is set up to run as a service.
User name:
Browse...
Password:
< Back
Next >
Cancel
Help

10) ***En "ADAM Administrators" seleccionar la primera opción y pasar a la siguiente pagina.***


Active Directory Application Mode Setup Wizard
ADAM Administrators
You can specify the user or group that will have administrative privileges for this instance of ADAM.
Assign the following user or group of users administrative permissions for ADAM.
Currently logged on user: CAPTARIS\GaomingFu
The user that is installing ADAM will have administrative permissions for this instance of ADAM.
This account
The selected user or group will have administrative permissions for this instance of ADAM. You can choose any user or group from this computer, this computer's domain, or any domain that is trusted by this computer's domain.
Account name:
Browse...
< Back
Next >
Cancel
Help

11) En "Importing LDIF Files" seleccionar la segunda opción y agregar los 4 archivos:

- ***a. Seleccionar MS-AZMan.LDF + click Add***
- ***b. Seleccionar MS-InetOrgPerson.LDF + click Add***
- ***c. Seleccionar MS-User.LDF + click Add***
- ***d. Seleccionar MS-UserProxy.LDF + click Add***
- ***e. Pasar a la siguiente pagina.***


Active Directory Application Mode Setup Wizard
Importing LDIF Files
You can import data from Lightweight Directory Interchange Format (LDIF) files into your ADAM application directory partition.
To configure the ADAM service in a specific way, import one or more of the LDIF files listed below.
Do not import LDIF files for this instance of ADAM
Import the selected LDIF files for this instance of ADAM
Available files:
Selected LDIF files:
MS-AZMan.LDF
MS-InetOrgPerson.LDF
MS-User.LDF
MS-UserProxy.LDF
Add ->
<- Remove
< Back
Next >
Cancel
Help

12) En "Ready to Install" leer datos de instalación y finalizar la instalación.

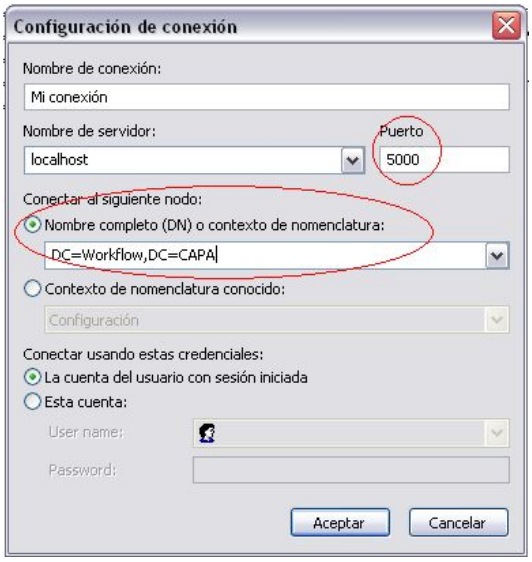
Configuración de Permisos en ADAM

1) *Seleccionar dentro del menú de ADAM: Editor ADSI de ADAM*

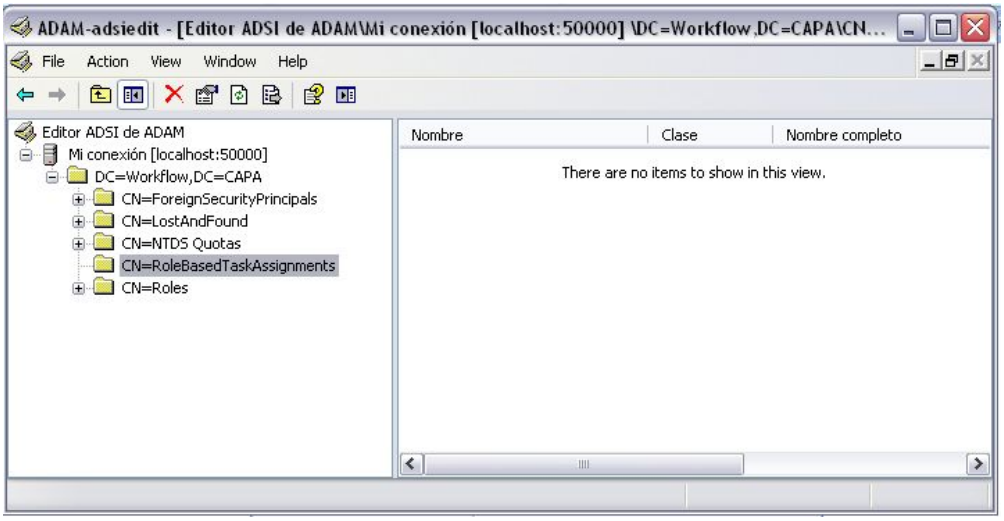
2) *Con el botón derecho en ADAM ADSI Edit, seleccionar Connect to…*

3) *Colocar los siguientes valores:*
   a. *Puerto: 50000*
   b. *Conectar al siguiente nodo: Seleccionar la primer opción ("Nombre Completo(DN) o Contexto de Nomenclatura")*

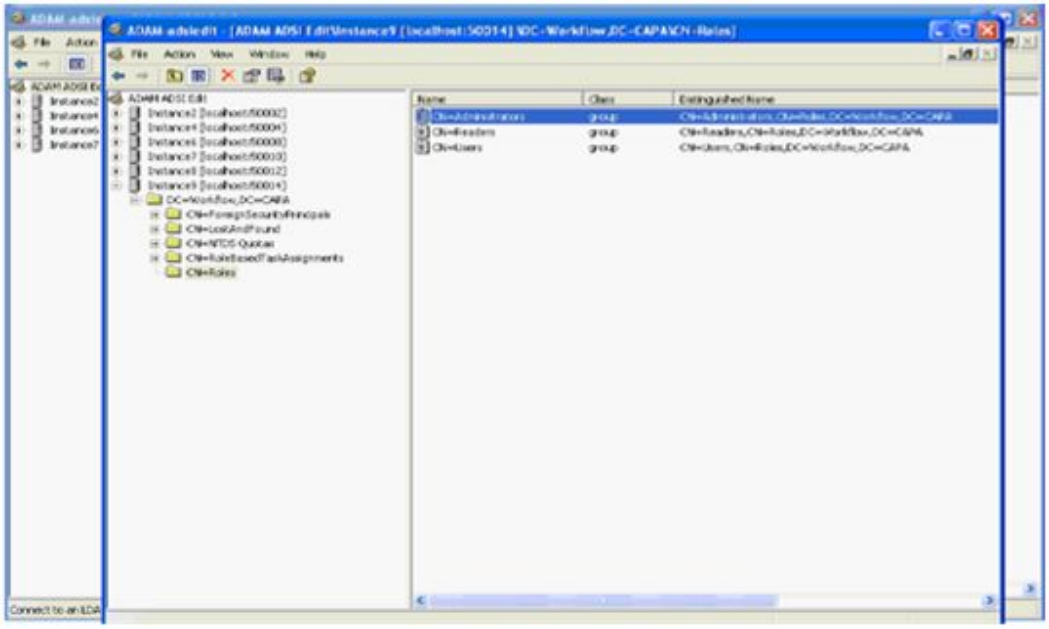
Colocar el siguiente valor: DC= Workflow,DC=CAPA.



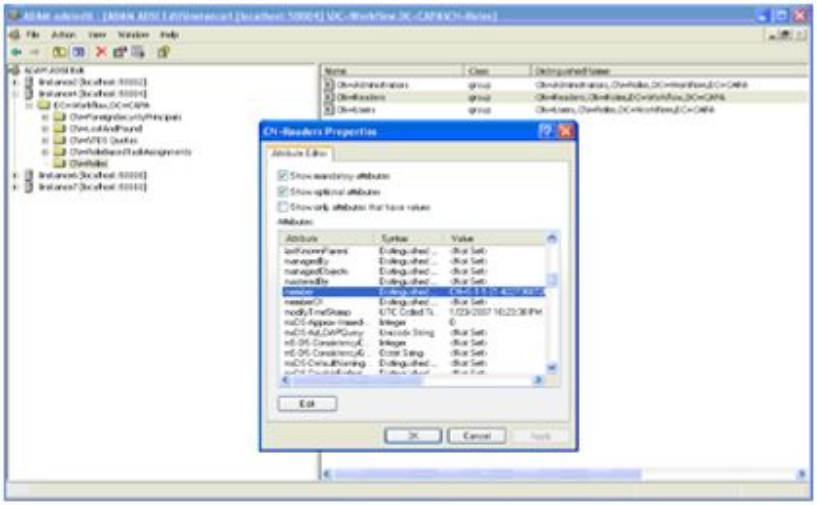
4) ***Click en "Aceptar"***
5) ***En la instancia creada (50000) verificar la existencia de las siguientes carpetas:***
    a. ***CN=ForeignSecurityPrincipals***
    b. ***CN=LostAndFound***
    c. ***CN=NTDS Quotas***
    d. ***CN=RoleBasedTaskAssignments***
    e. ***CN=Roles***



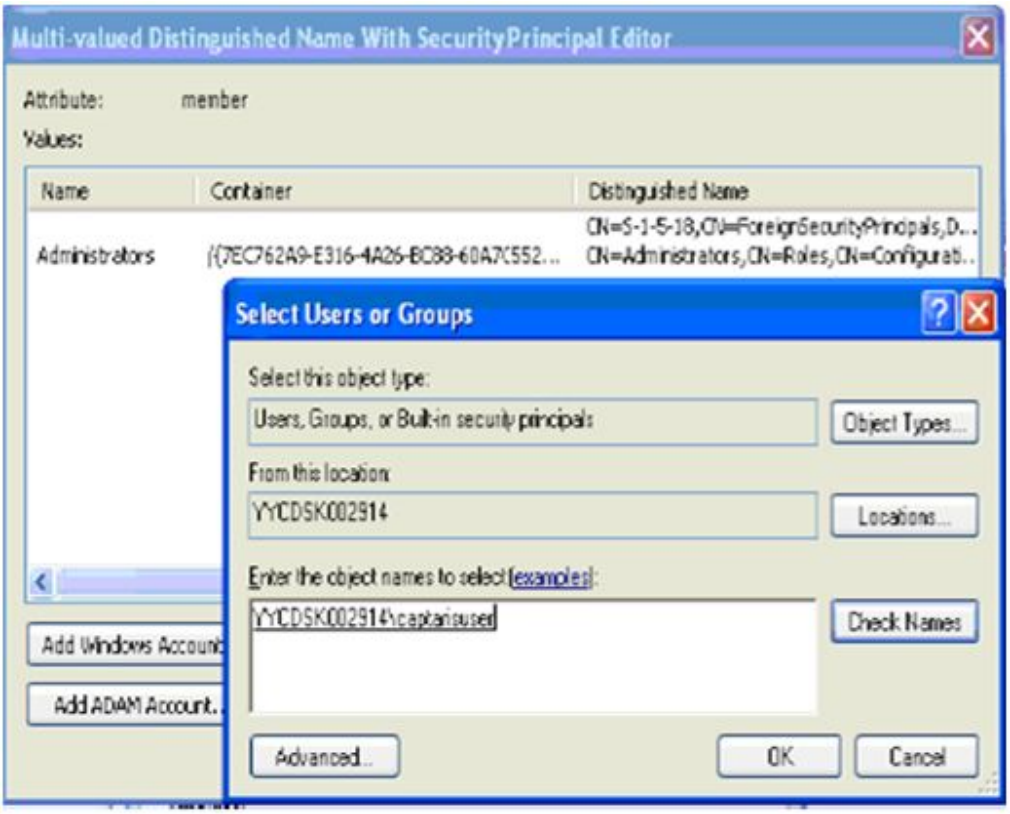
6) *La carpeta CN=RoleBasedTaskAssignments es creada por el proceso de configuración de Captaris especificado en el próximo punto. En este punto esta carpeta no existirá.*
7) *Sobre CN=Roles seleccionar con doble click "Administrator"*



8) *Dentro de "Attribute Editor" buscar "member", click en Edit*



9) *Click en "Add Windows Account" y agregar el usuario de Captaris del server.*



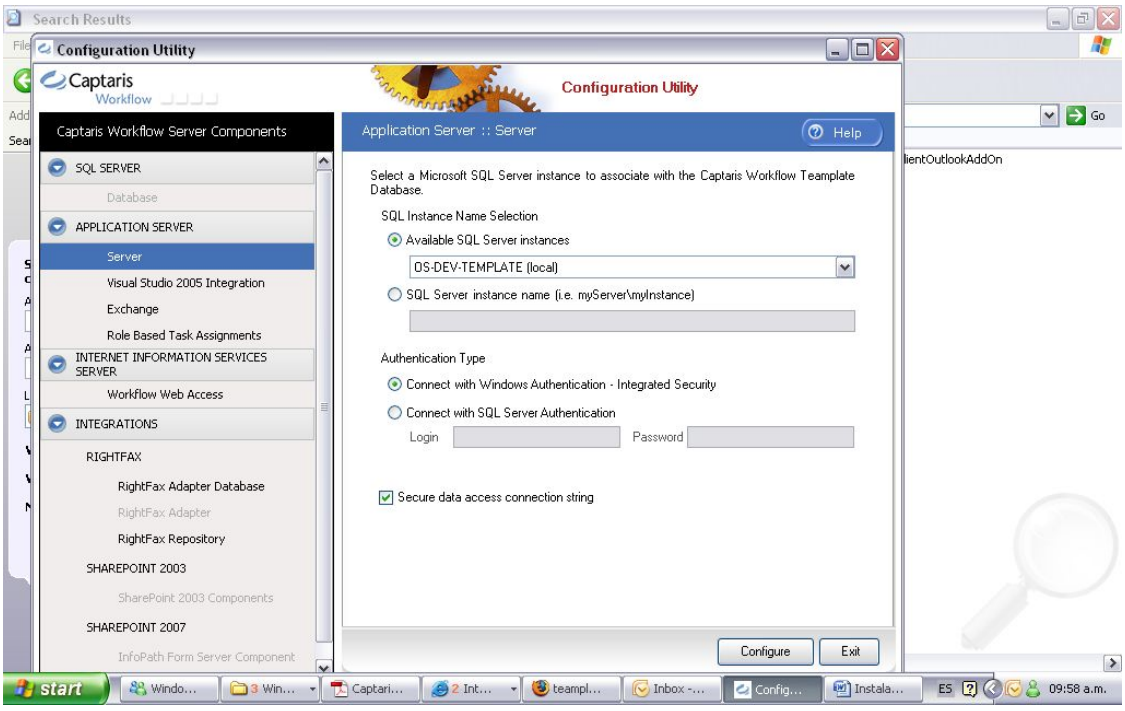
Instalación de Captaris Workflow

1. ***Ejecutar CaptarisWorkflowSetup.exe***
2. ***Seleccionar "Server Installation" y seguir instrucciones de instalación.***

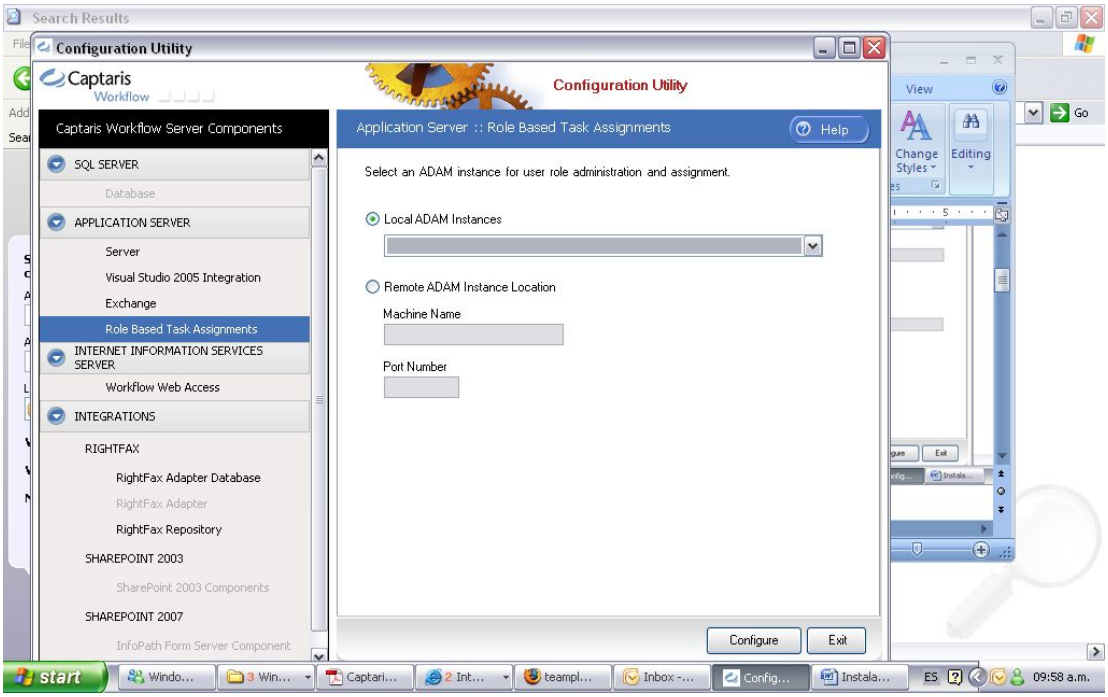
Captaris Workflow - InstallShield Wizard
Setup Type
Choose the setup type that best suits your needs.
Please select a setup type.
Client Installation
This allows you to choose which Captaris Workflow end-user client applications will be installed.
Server Installation
This allows you to choose which Captaris Workflow server components will be installed. In addition, you can select which client applications will be installed on the server.
InstallShield
Help
< Back
Next >
Cancel

Configuración de Captaris Workflow

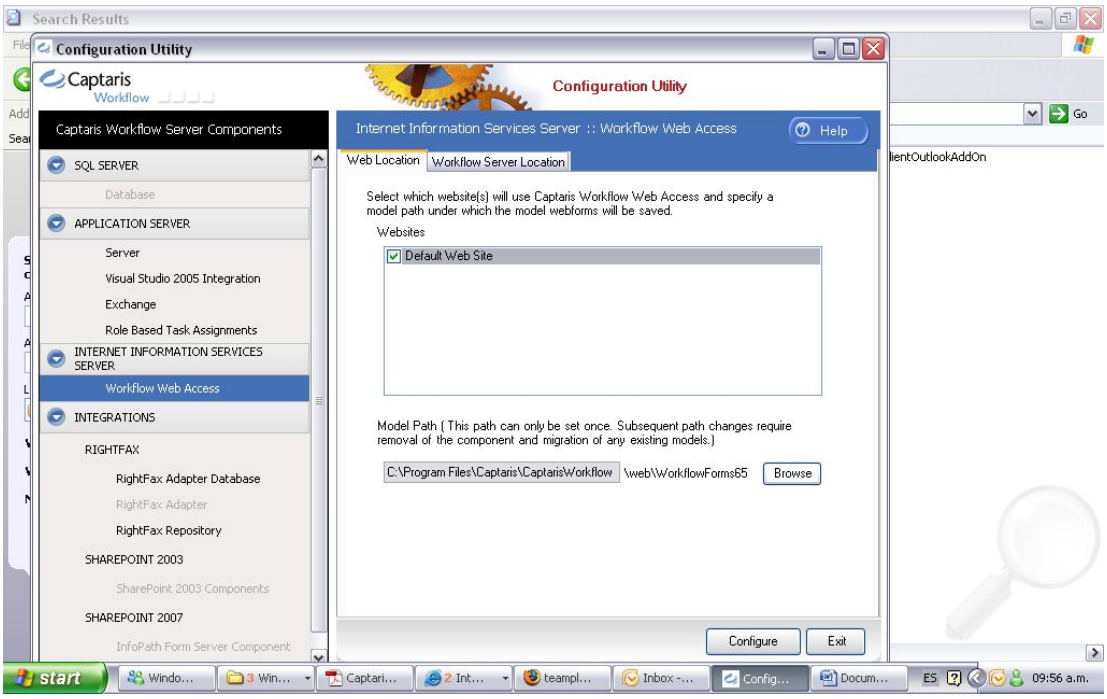
1. *En Server: Verificar datos de SQL Server.*

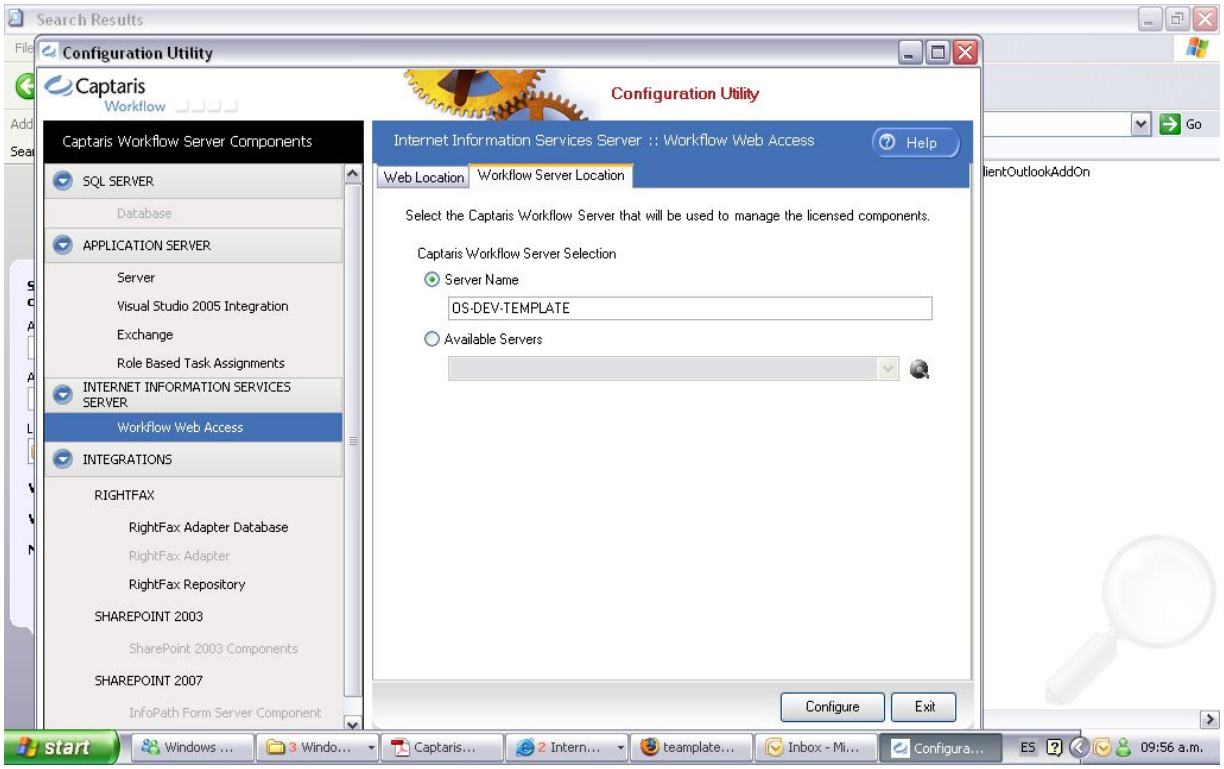


2. *En Role Based Task Assignments: Seleccionar la instancia de ADAM creada.*



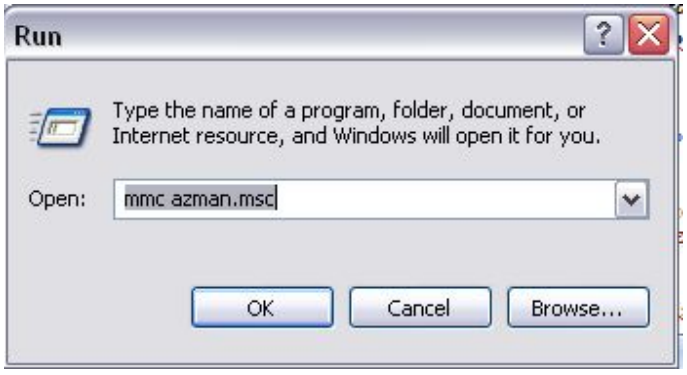
3. *En "Workflow Web Access" seleccionar "Default Web Site"*



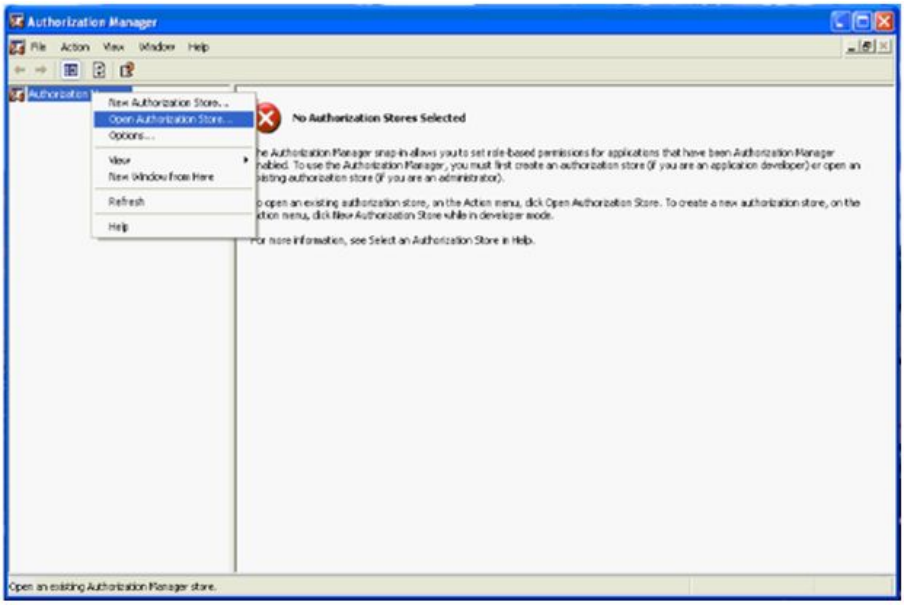


Configuración de Permisos en AzMAN

1. ***Run: mmc azman.msc***

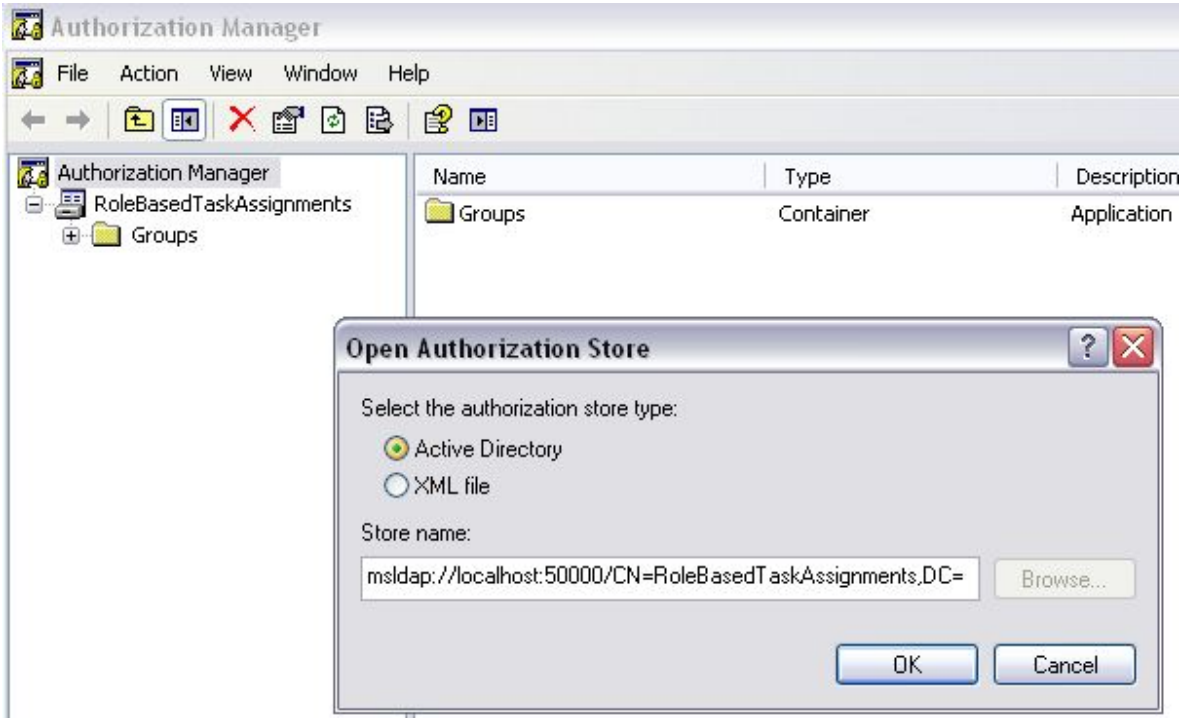


2. ***Con botón derecho sobre "Authorization Manager" seleccionar "Open Authorization Store…"***



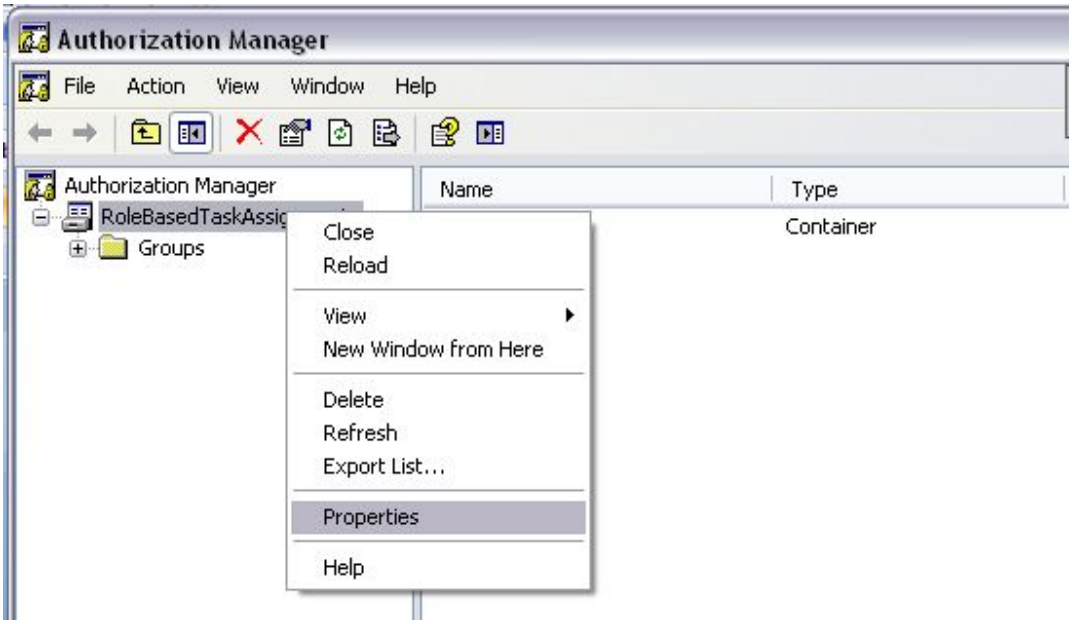
3. ***Seleccionar la primer opción y cargar el siguiente valor:***

msldap://localhost:50000/CN=RoleBasedTaskAssignments,DC=Workflow,DC=CAPA

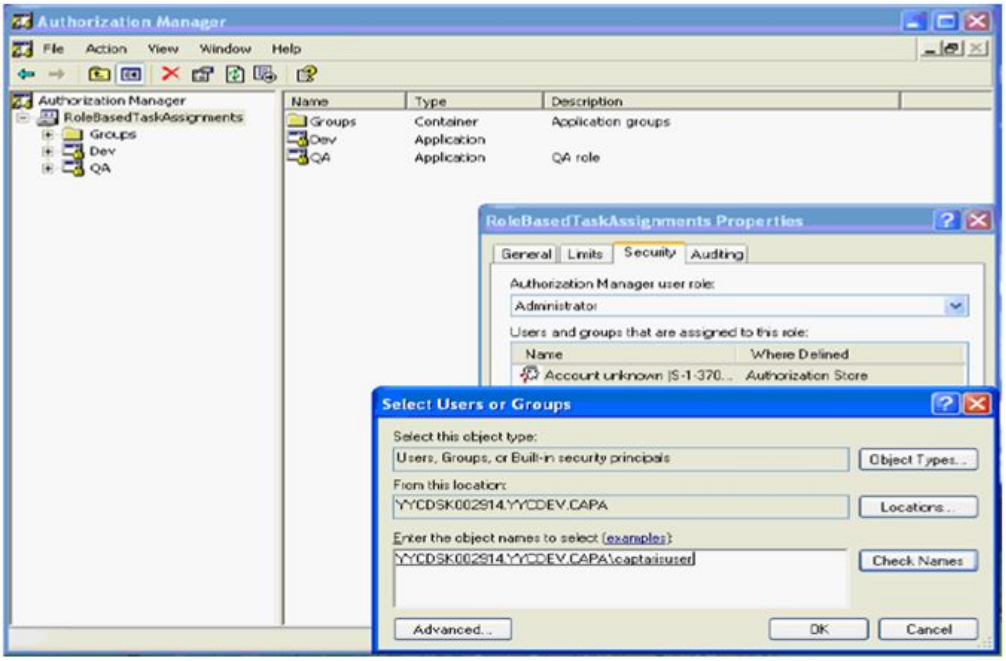


4. ***Click OK***

5. ***Con el botón derecho seleccionar "Properties"***

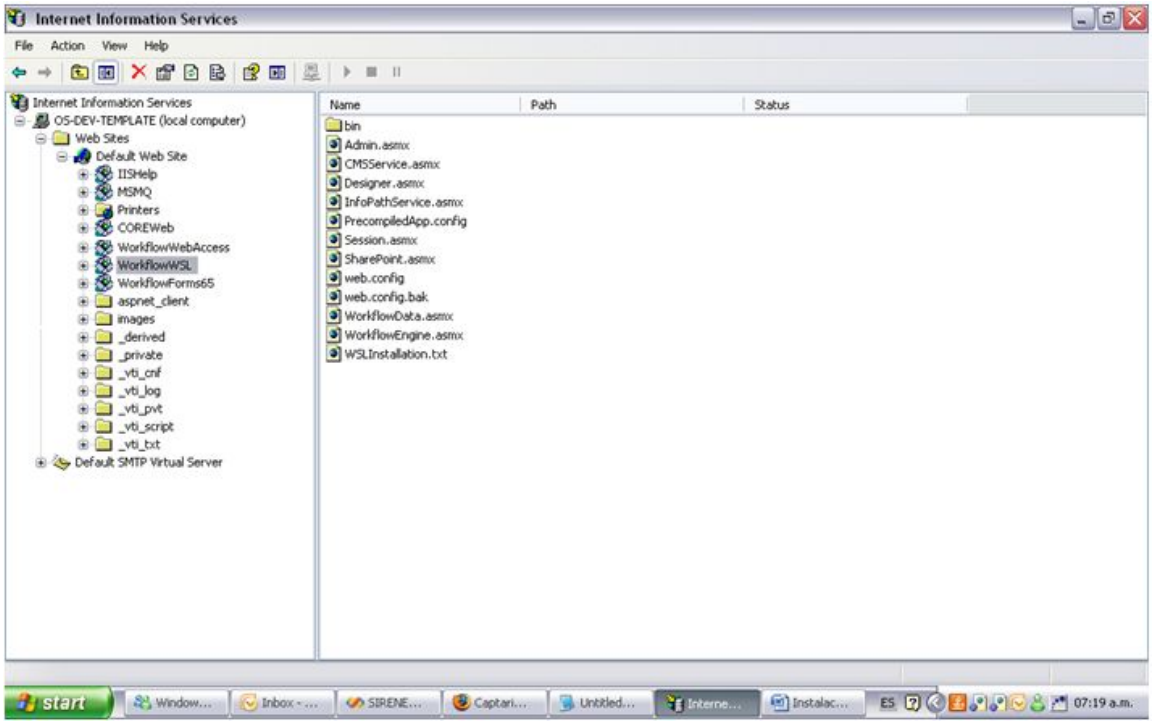


6. ***Seleccionar el tab "Security"***
7. ***Seleccionar "Administrator"***
8. ***Agregar el usuario de Captaris (el mismo de ADAM).***

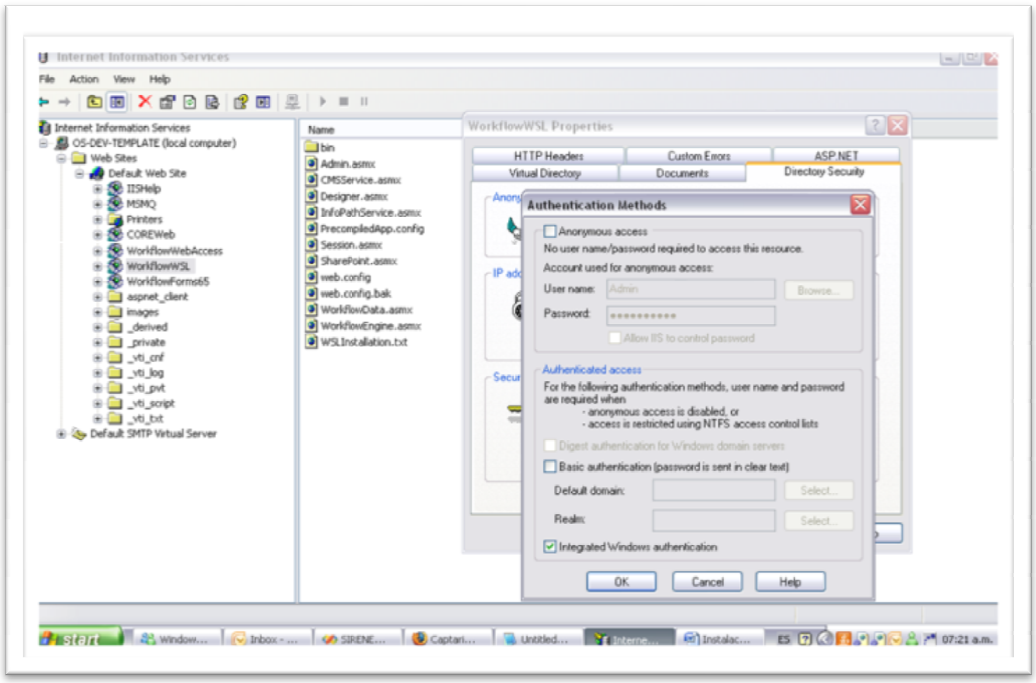


Configuración de IIS

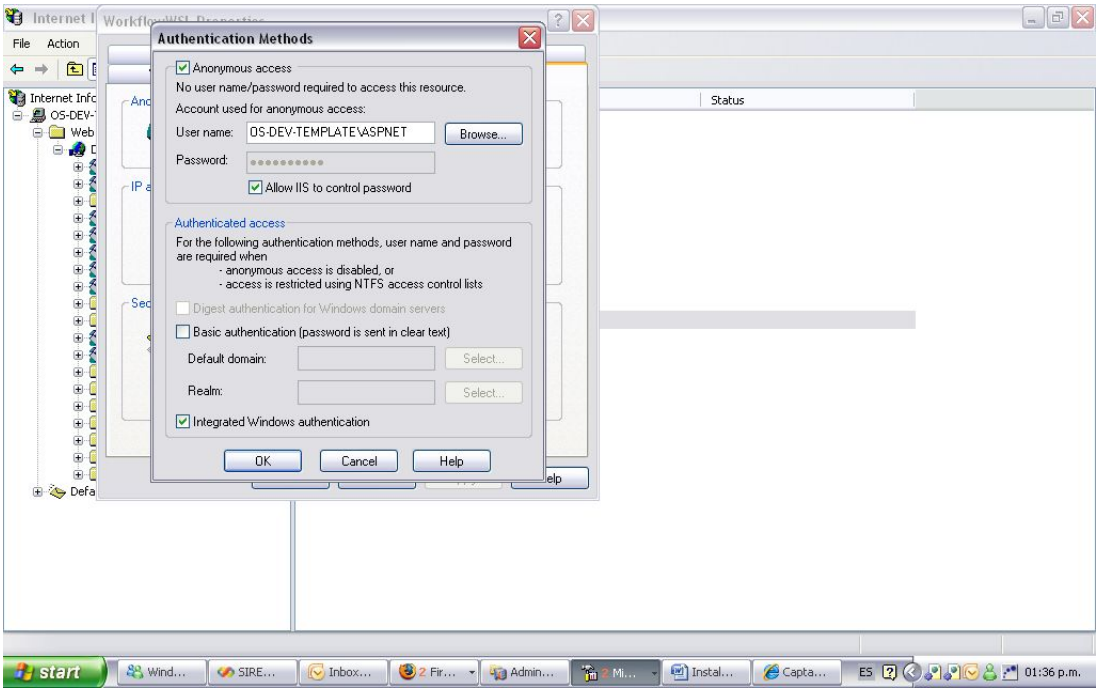
1. **Verificar En IIS deben estar los 3 WS de Captaris:**
    a. **WorkflowWebAccess**
    b. **WorkflowWSL (principal)**
    c. **WorkflowForms65**
2. **Si no existen verificar la configuración anterior en "Workflow Web Access"**



3. **Dentro de las propiedades de WorklfowWSL hay que configurar correctamente el usuario de acceso sino el Web Service no podrá conectarse. Sobre "WorkflowWSL" con el botón derecho seleccionar "Propiedades"**
4. **En la solapa de "Directory Security" seleccionar "Edit"**



3. **En la ventana "Authentication Method" modificar los siguientes valores:**
   - **Anonymous Access: Seleccionado**
   - **User Name: ASPNET**
   - **Password: no modifique**
   - **Allow IIS to password= Seleccionado**
   - **Integrated Windows authentication= Seleccionado**



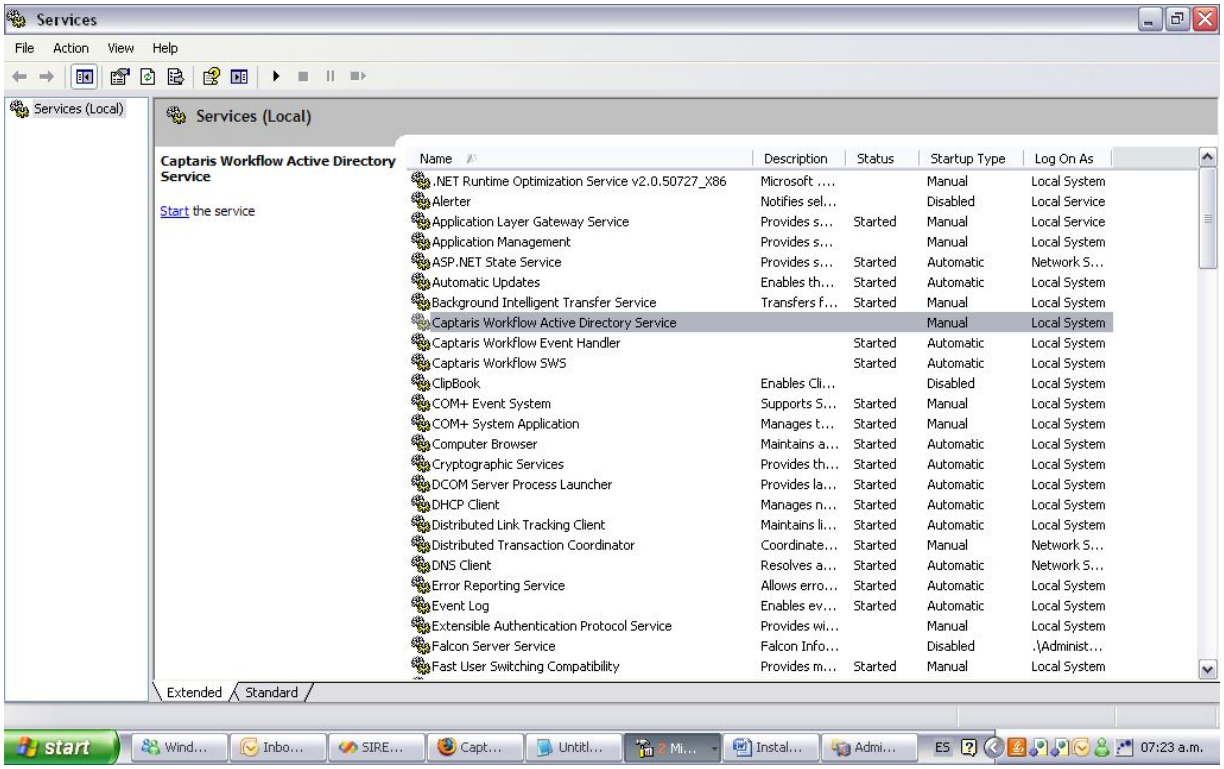
Configuración de Servicios Windows

1. **En Control Panel/Administrative Tools/Services verificar los siguientes Servicios:**
   - Captaris Workflow Active Directory Service
   - Captaris Workflow Event Handler
   - Captaris Workflow SWS
2. **Si no se encuentran instalarlos(ref. Manual de Captaris: Setup the Data Access Layer) :**
   a. **Abrir la ventana de DOS:**
   b. **Navegar hasta:**

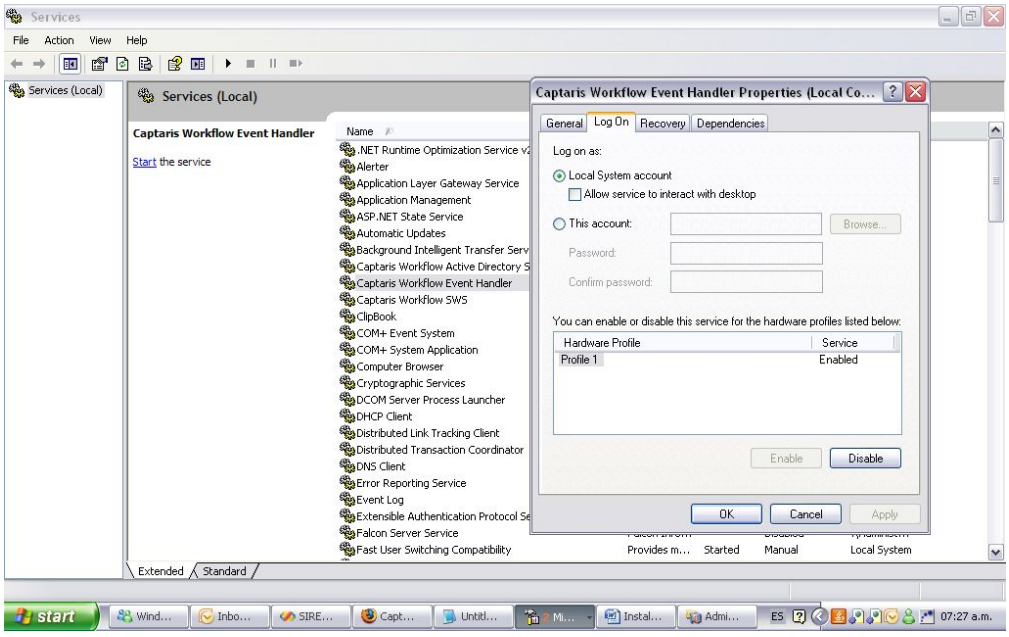
   C:\Program Files\Captaris\Captaris Workflow\RemotingSupport

   c. **Escribir el comando: InstallUtil CaptarisWorkflowSWS.exe**
   d. **Verificar que la instalación se haya realizado con éxito: "The Commit phase completed successfully"**

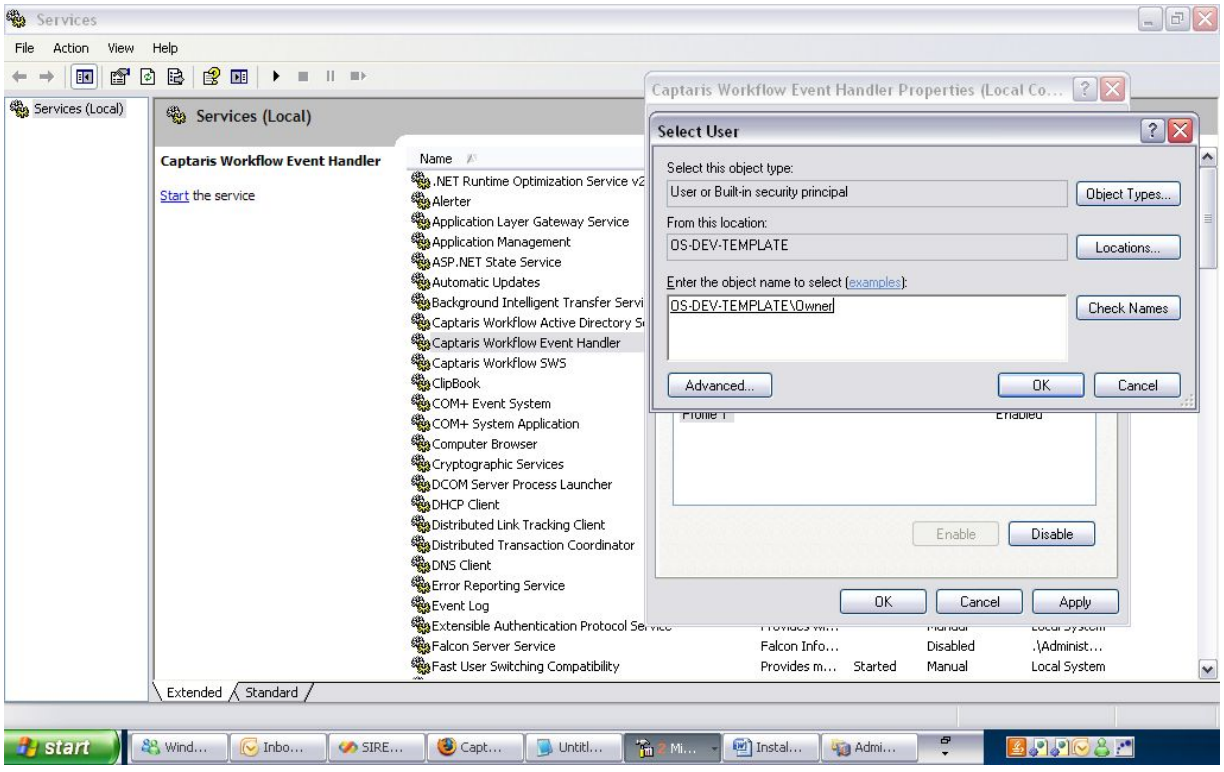
3. **En Administrative Tools/Services seleccionar “Captaris Workflow Event Handler”**


Services
File Action View Help
Services (Local)
Services (Local)
Captaris Workflow Active Directory Service
Start the service
Name Description Status Startup Type Log On As
.NET Runtime Optimization Service v2.0.50727_X86 Microsoft .... Manual Local System
Alerter Notifies sel... Disabled Local Service
Application Layer Gateway Service Provides s... Started Manual Local Service
Application Management Provides s... Manual Local System
ASP.NET State Service Provides s... Started Automatic Network S...
Automatic Updates Enables th... Started Automatic Local System
Background Intelligent Transfer Service Transfers f... Started Manual Local System
Captaris Workflow Active Directory Service Manual Local System
Captaris Workflow Event Handler Started Automatic Local System
Captaris Workflow SWS Started Automatic Local System
ClipBook Enables Cli... Disabled Local System
COM+ Event System Supports S... Started Manual Local System
COM+ System Application Manages t... Started Manual Local System
Computer Browser Maintains a... Started Automatic Local System
Cryptographic Services Provides th... Started Automatic Local System
DCOM Server Process Launcher Provides la... Started Automatic Local System
DHCP Client Manages n... Started Automatic Local System
Distributed Link Tracking Client Maintains li... Started Automatic Local System
Distributed Transaction Coordinator Coordinate... Started Manual Network S...
DNS Client Resolves a... Started Automatic Network S...
Error Reporting Service Allows erro... Started Automatic Local System
Event Log Enables ev... Started Automatic Local System
Extensible Authentication Protocol Service Provides wi... Manual Local System
Falcon Server Service Falcon Info... Disabled .\Administ...
Fast User Switching Compatibility Provides m... Started Manual Local System
Extended Standard
start
07:23 a.m.

4. **Captaris Workflow Event Handler: Detener este servicio. Con el botón derecho seleccionar “Properties”.**
5. **Seleccionar tab “Log On”**

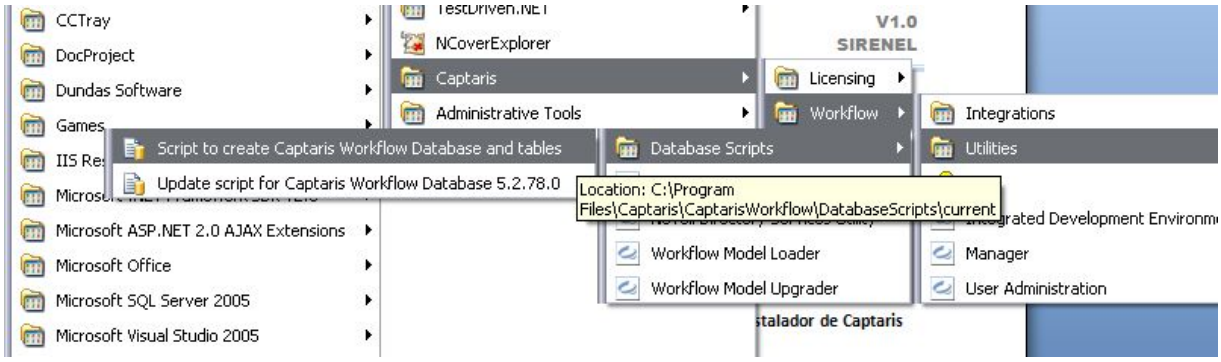


6. **Seleccionar "This Account" y buscar el usuario de Captaris (Browse..)**

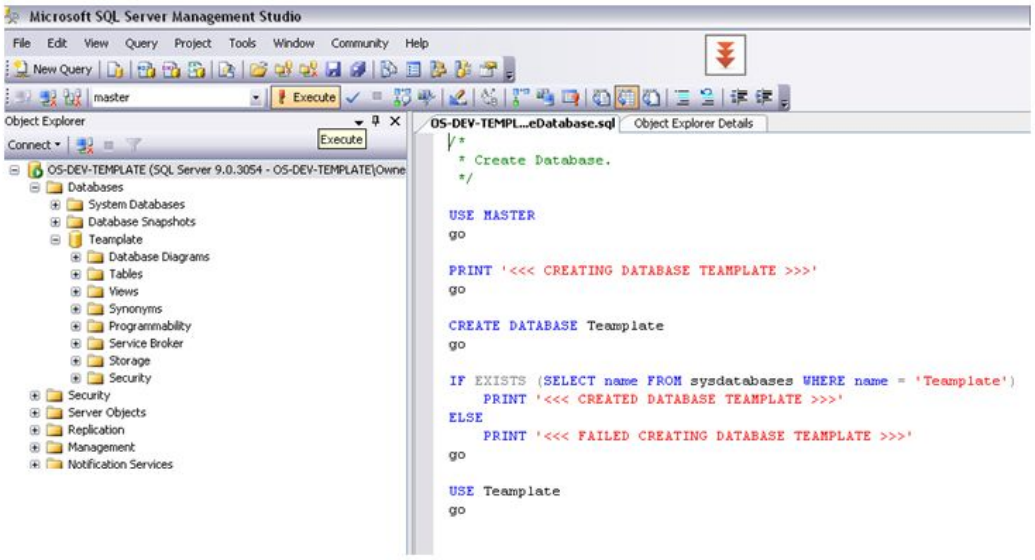


Configuración de Base de Datos Captaris

1. **La base de Datos de Captaris se llama "Teamplate"**
2. **Ejecutar el script de creación de la base de datos proporcionado por el instalador de Captaris. Dentro del menú de Captaris, seleccionar el script (click): "Script to Create Captaris Workflow Database and tables"**

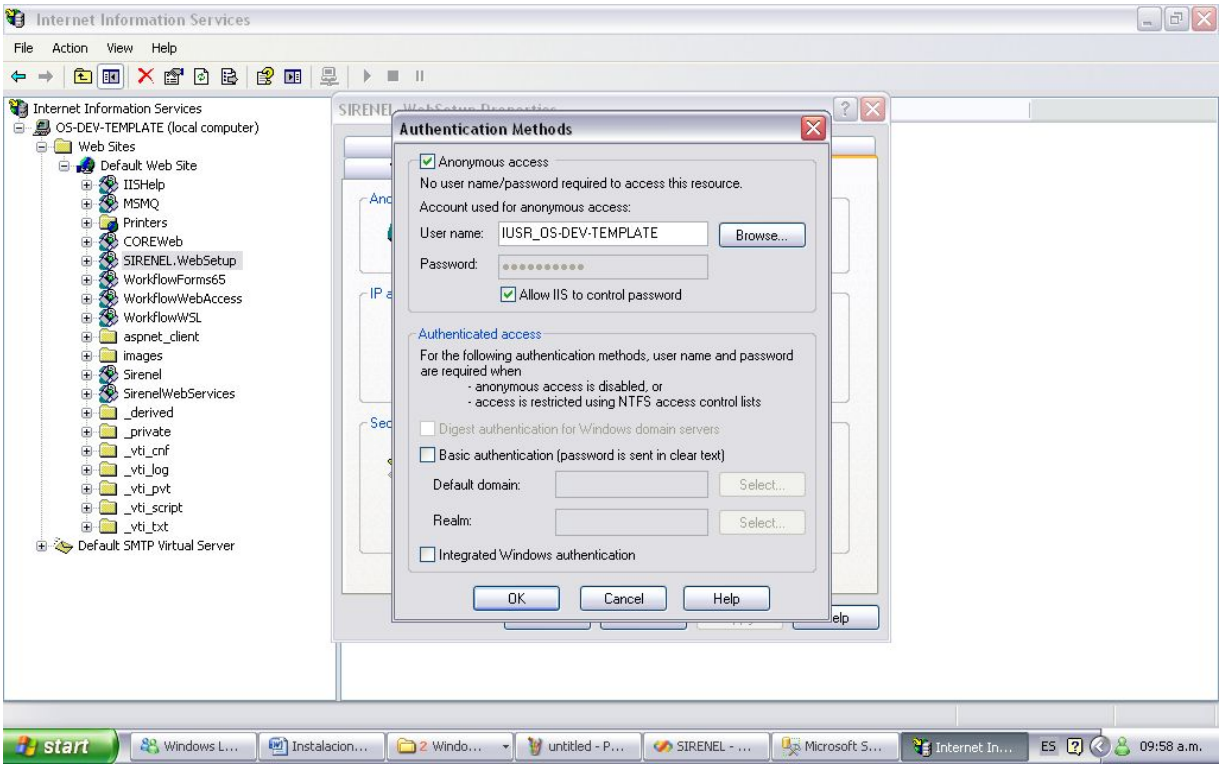


3. **En Microsoft SQL Server Manager: Ejecutar el script.**



Instalación de Hot Fix Captaris

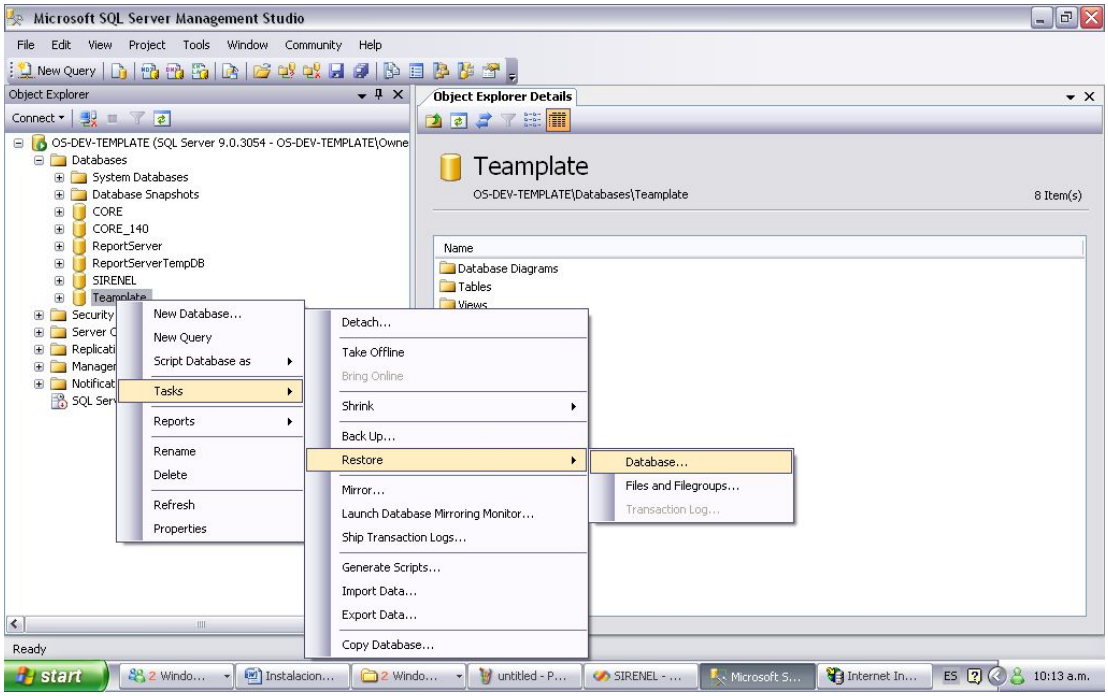
1. **Instalar el Hot Fix de Captaris para la versión 6.5 disponible en la pagina: http://www.captaris.com/support/downloads/captaris_workflow/index.html**
2. *Nombre : **Workflow65Hotfix1**.exe*



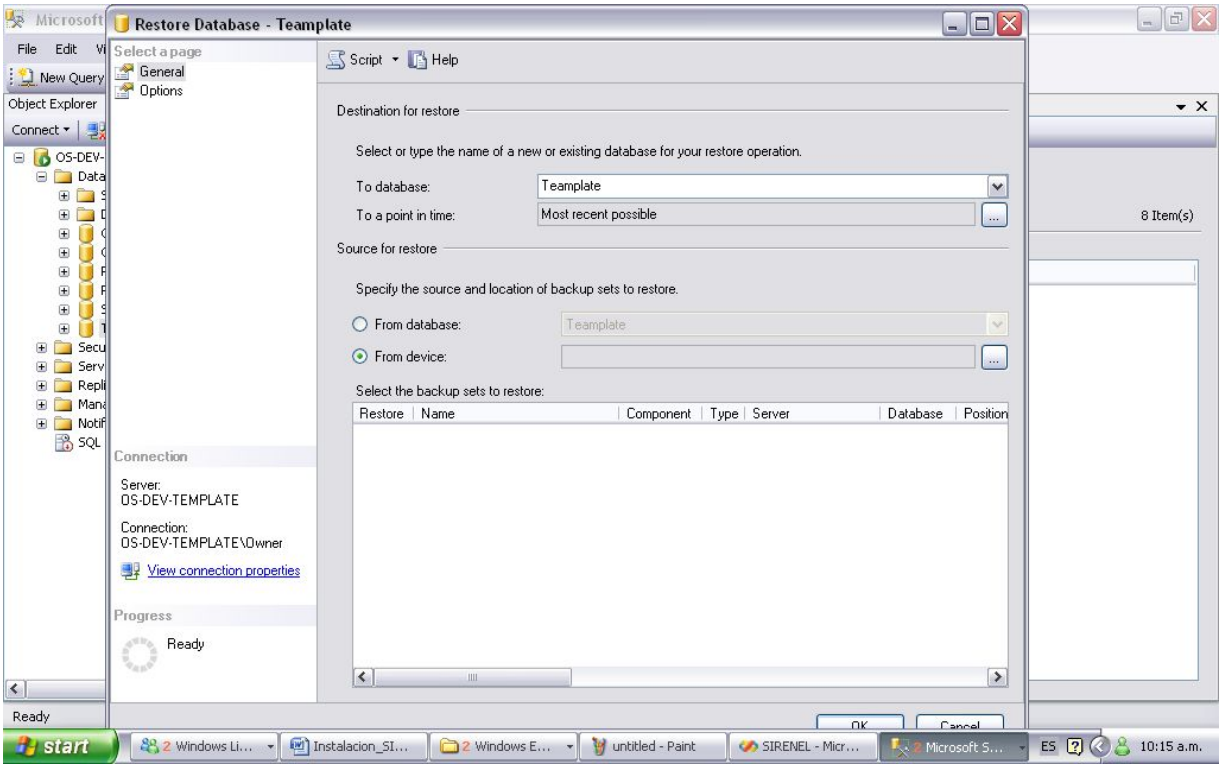
Actualización de Base de Datos Captaris

Esta actualización carga los modelos desarrollados en la base de datos de Captaris.

1. **Levantar backup de base de datos Teamplate: "CaptarisTeamplate"**
2. **Abrir Microsoft SQL Server Manager**
3. **Boton derecho sobre base de datos "Teamplate" seleccionar Task/Restore/Database**



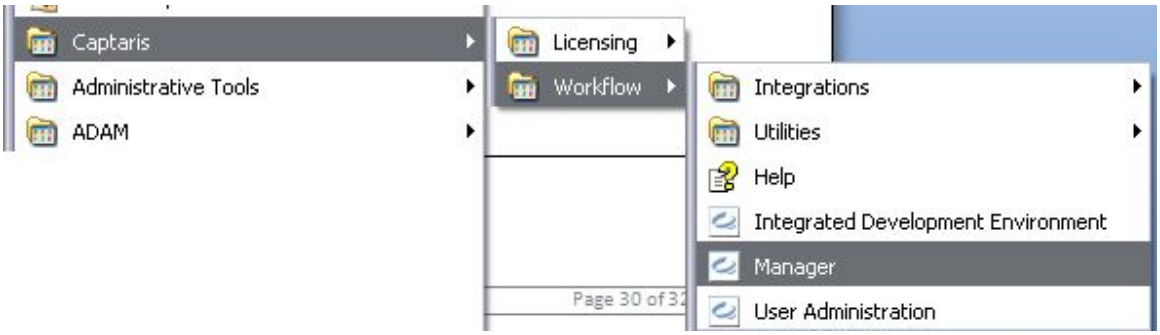
4. En la pantalla seleccionar: From device



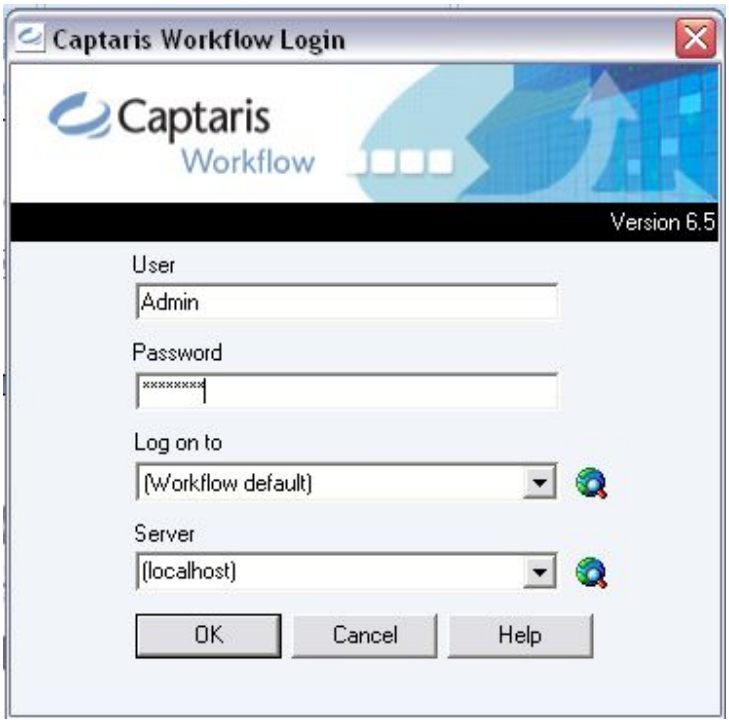
5. **Buscar el backup CaptarisTeamplate.**
6. **En Tab Options seleccionar "Overwrite the existing database"**
7. **Click OK**

Visualización de Modelos en Entorno Captaris

1. **Ejecutar Captaris Workflow**



2. **Ingresar Usuario y clave:**
   - **User: Admin**
   - **Password: ""**



3. **En la carpeta “Models” encontrara los modelos con el nombre correspondiente.**

4. **Sobre el modelo con botón derecho seleccionar “New Process”**

5. **Se genera un nuevo proceso donde puede observar el modelo correspondiente. Esto permite ver el modelo.**

Errores Frecuentes

AZMan:

Error de permisos en Captaris que provoca la falla en la tarea que se ejecuta en el proceso.

Causa: Esto se debe a que el usuario cargado en AZMan no es el mismo que ejecuta Captaris a travez del servicio web.

Solucion: Verifique el usuario en AZMan y vuelva a realizar las pruebas o cargue en AZMan todos los usuarios asi no tendrá el mismo inconveniente si otro usuario accede.